

FlowDocs

User's Manual



Contents

LOGIN	4
First Login o after reset password	4
DASHBOARD.....	5
REPORTS.....	6
Database Connections.....	7
New Database Connection	7
Edit Database Connection	8
Delete Database Connection	8
Test Database Connection.....	8
New Report	9
Data Filter Panel	10
Group By Panel	12
Report Properties	13
Edit Report	14
Delete Report	14
Setting Report Security.....	15
Groups.....	16
New Group	16
Meridian Vaults Access	18
New Meridian Vault	18
Dashboard Configuration	19
New Dashboard	20
Setting Dashboard Security	23
NOTIFICATIONS	24
SMTP Servers	24
New SMTP Server configuration.....	25
Test SMTP Connection	25

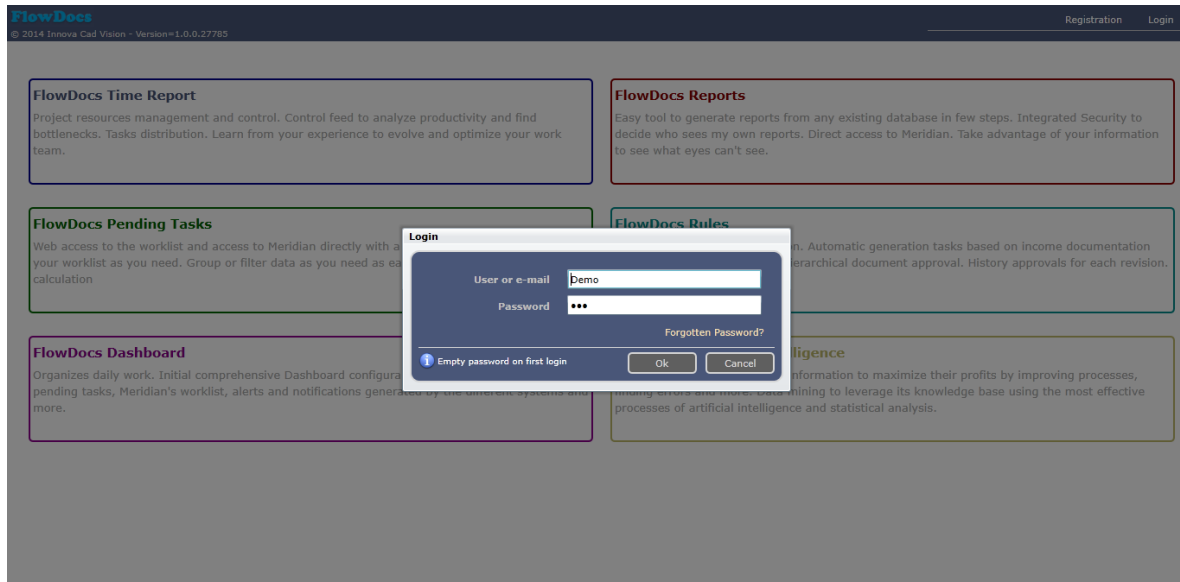


Test E-mail sending	26
Notification Types	27
New Notification Type.....	28
Notification Message Format	29
New message format	30
Notification Rule	31
New Notification Rule	32
Personal Panel.....	33
User Personal Data	33
Change Password	33
Notifications grid.....	34
Turn on/off Notification	34



LOGIN

User can login by using his e-mail or user nick that should be the same as domain user.



First Login or after reset password

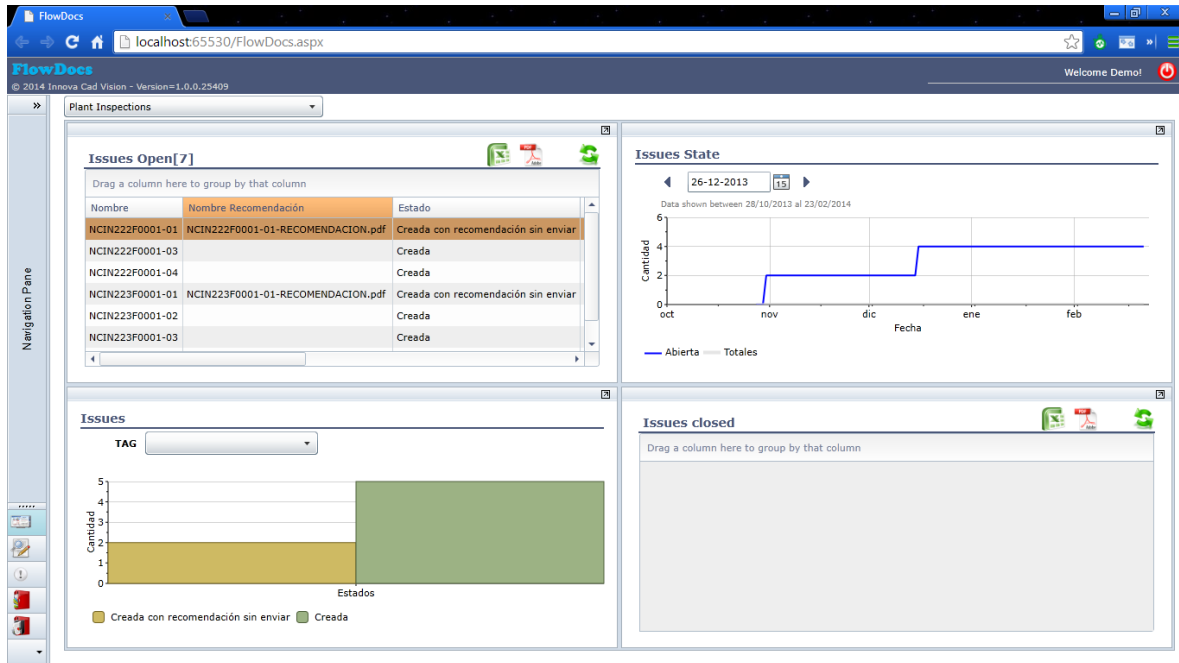
On first login or after system administrator blank password, user must use empty password on login. The system would required to input the new password after this action.

A screenshot of a 'Change your Password' dialog box. The dialog has a title bar and a dark blue background. It contains three input fields: 'Password', 'New Password', and 'Repeat new Password'. At the bottom right of the dialog are two buttons: 'Ok' and 'Cancel'.

FlowDocs

DASHBOARD

After logging in or accessing to Dashboard menu button, user can see the dashboard according given role or roles to him.



The Dashboard is composed by one or more reports. These reports are configure in Reports module and are assigned to user by roles (see reports configuration).

FlowDocs

REPORTS































Reports module allows user to create reports easily and in a few steps. First of all user need to configure database access defining database connections.

FlowDocs
© 2014 Innova Cad Vision - Version=1.0.0.25409
Welcome Demo!

BI - Business Intelligence

Search...

Drag a column here to group by that column


ID	DB Conn	View	Alias	Group	Actions
28	Plant Inspections	Reporte_NoConformidades	Issues closed	Plant Inspections	  
29	Plant Inspections	Reporte_NoConformidades	Issues Open	Plant Inspections	  
30	Plant Inspections	Reporte_NoConformidades	Issues not sent	Plant Inspections	  
31	Plant Inspections	Reporte_NoConformidades	Issues	Plant Inspections	  
32	Plant Inspections	Reporte_NoConformidadesTendencia	Tendencia NC	Plant Inspections	  
35	Data Library Training	Reporte_DataLibraryDemo	Worklist Demo	Pending Tasks - My Work List	  
36	Data Library Training	Reporte_DataLibraryDemo	Data Library Demo	Generales	  
40	Demo Vault Total 2014	Reporte_Documentos_Demo	Demo Documents	Generales	  
45	FTTN	Reporte_SeguimientoFTTN	Seguimiento FTTN	Reportes FTTN	  
46	FTTN	Reporte_Frentistas	Frentistas	Reportes FTTN	  

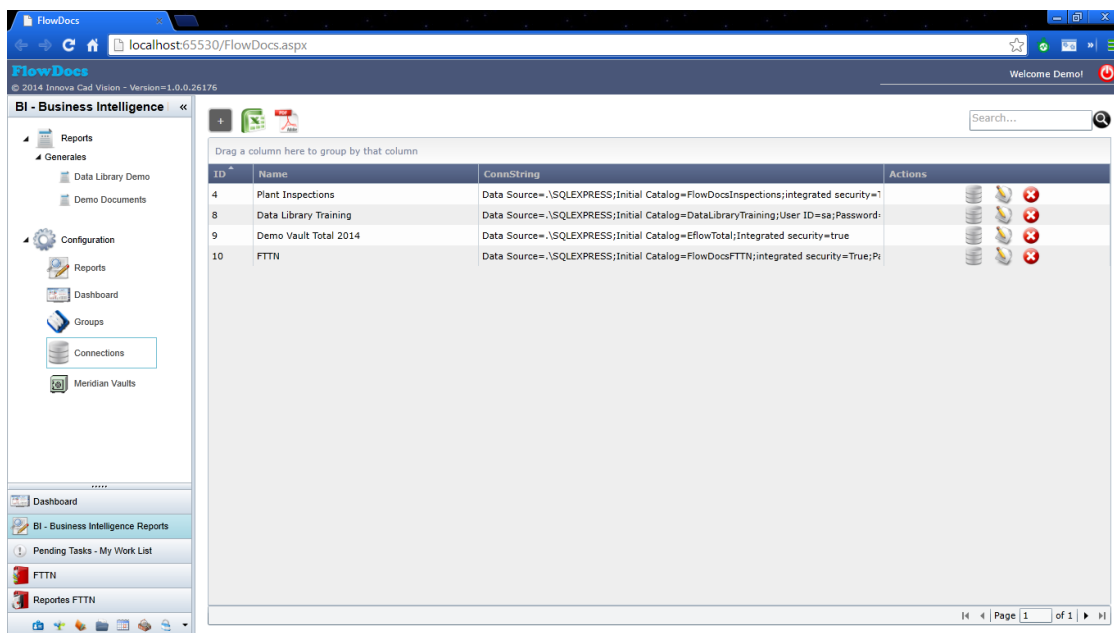
Page 1 of 1

FlowDocs


Carlos Pellegrini 651 5th Floor
(C1009ABM) Buenos Aires - Argentina
Telephone: (+5411) 5353-9804, Mail to: contacto@flowdocs.com

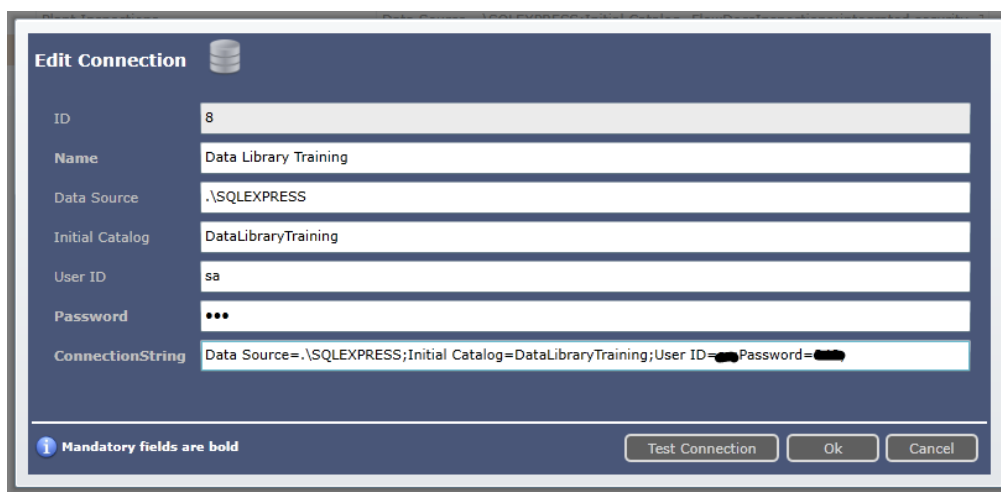
Database Connections

To access database connections, user must click on Connections button  **Connections** in Reports Configuration menu.



New Database Connection

To create a new connection, user must click on . After this action, new connection window will appear as image shown below. After the user completed required data, must click **ok** button to save changes.



The 'Edit Connection' dialog box is shown with the following fields and values:



Field	Value
ID	8
Name	Data Library Training
Data Source	.\SQLEXPRESS
Initial Catalog	DataLibraryTraining
User ID	sa
Password	...
ConnectionString	Data Source=.\SQLEXPRESS;Initial Catalog=DataLibraryTraining;User ID=sa;Password=...

At the bottom, there is a 'Mandatory fields are bold' message and three buttons: 'Test Connection', 'Ok', and 'Cancel'.

FlowDocs


Edit Database Connection

To edit a connection, user must click on edit button in the grid row of the connection to edit. After this action, edit connection window will appear. After the user completed required data, must click ok button to save changes.

8	Data Library Training	Data Source=.\SQLEXPRESS;Initial Catalog=DataLibraryTraining;User ID=sa;Password=	 
---	-----------------------	---	---



Delete Database Connection

To delete a connection, user must click on **delete** button in the grid row of the connection to delete.

8	Data Library Training	Data Source=.\SQLEXPRESS;Initial Catalog=DataLibraryTraining;User ID=sa;Password=	
---	-----------------------	---	---


Test Database Connection

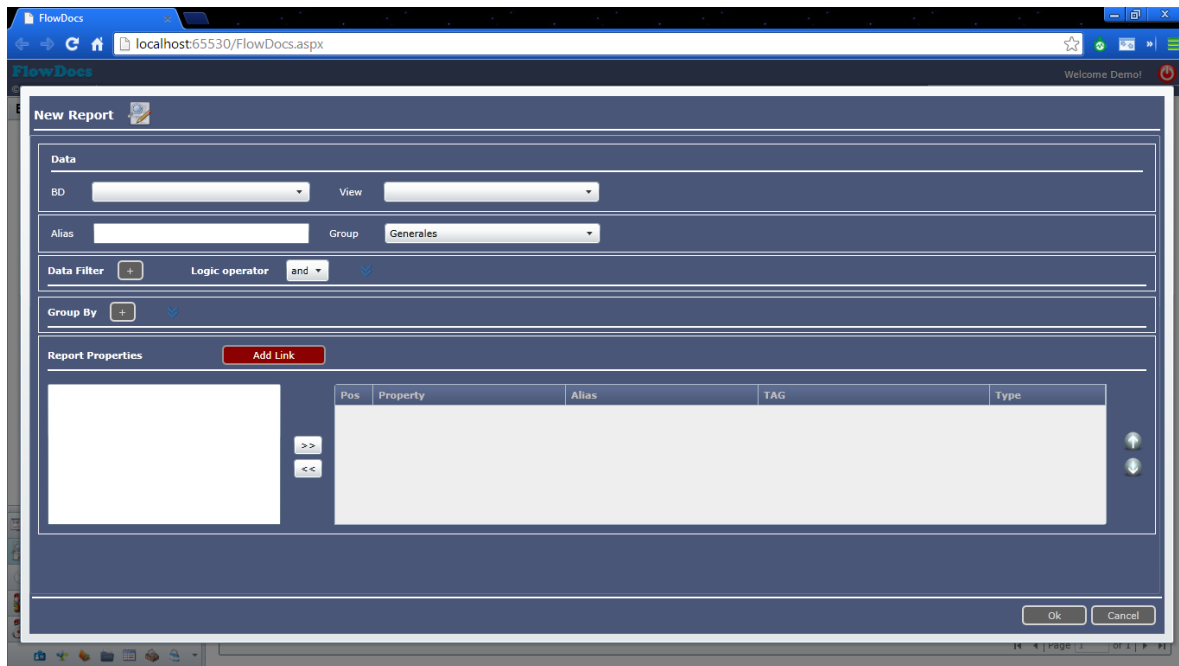
To Test a connection, user must click on **Test button** in the grid row of the connection to test.

8	Data Library Training	Data Source=.\SQLEXPRESS;Initial Catalog=DataLibraryTraining;User ID=sa;Password=	 
---	-----------------------	---	---

FlowDocs

New Report

To create a new Report, user must click on . After this action, new Report window will appear as image shown below. After the user completed required data, must click **ok** button to save changes.

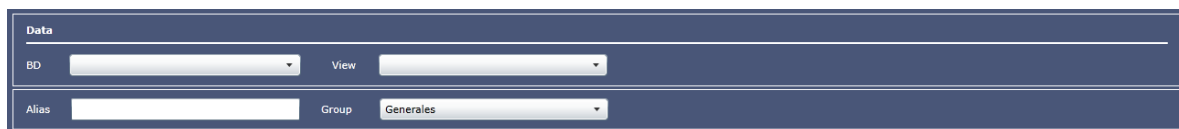


BD

Is the Database connection to use for the report.

View

Is the view defined in the database to use in the report. By Default, FlowDocs only shows database views with prefix **Report_** (see administrator manual)



Alias

Is the name of the report to show in Menu

Group

Is the group of views defined in **Reports Configuration Group**.


FlowDocs

Data Filter Panel

Defines the filters of the views depending on report properties.

The screenshot shows the 'Data Filter' panel. At the top, there is a 'Data Filter' label with a '+' button, followed by a 'Logic operator' dropdown set to 'and' and a refresh icon. Below this is a table with four columns: 'Field', 'Data type', 'Query', and 'Actions'. The table body is currently empty.

Add new Filter

To add a new filter, user must press . After this action, a screen will pop up as image below

The 'New Filter' dialog box is shown. It has a title bar with a close button. Inside, there is a 'Properties' section with a list box containing the following items: DocumentID, RevisionState, ToDoAction, Filename, StateText, **ToDoPerson** (highlighted), DocumentTypeDisplayName, and c_Custom_Area. Below the list box, the selected property 'ToDoPerson' is displayed. To its right are two checkboxes: '[ID Win User Connected]' and '[ID User Connected]'. Below these is a 'Value' text input field. At the bottom of the input field, it says '(Allow wildcards %)'. At the very bottom of the dialog are 'Cancel' and 'Add Filter' buttons.

Select view property and set the value depending on property type.

Text Property

If the property type is text, user can use wildcards %.

Example:

Property: Filename

Value: %.txt

This filter will make report to show only text files

Text properties Variables

Systems variables to add to filters on execution time

FlowDocs

[ID Win User Connected] This variable depends on the user logged to system. It is user domain ID

[ID User Connected] This variable depends on the user logged to system. It is user FlowDocs ID

Date Property

If the property type is Date, user can use operator to compare dates.

By Specific Date

Dates comparison depends on the specific date entered by user

By number of Days

Dates comparison depends on the report execution date less than days entered by user. **Note:**

Days can be negative if report needs to show records with dates after execution date.

Example:

Report: Projects to commit in next 30 days

Filter 1

Property: DateToCommit

Operator: <

Days: -30

Filter 2

Property: DateToCommit

Operator: >

Days: 0

Number Property

If the property type is Number, user can use operator to compare numbers with a constant defined.

Example:

Report: Documents with Revision 0 or 1

Filter

Property: RevisionNumber

Operator: <=

Number: 1



Expand Shrink Data Filter Panel


To expand Data Filter panel press  . To Shrink Data Filter Panel press 

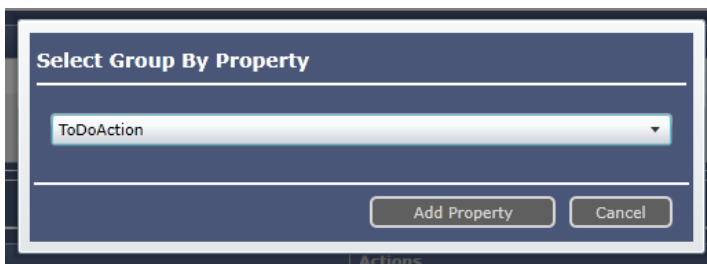
Group By Panel

Defines the properties of the views to Group information.

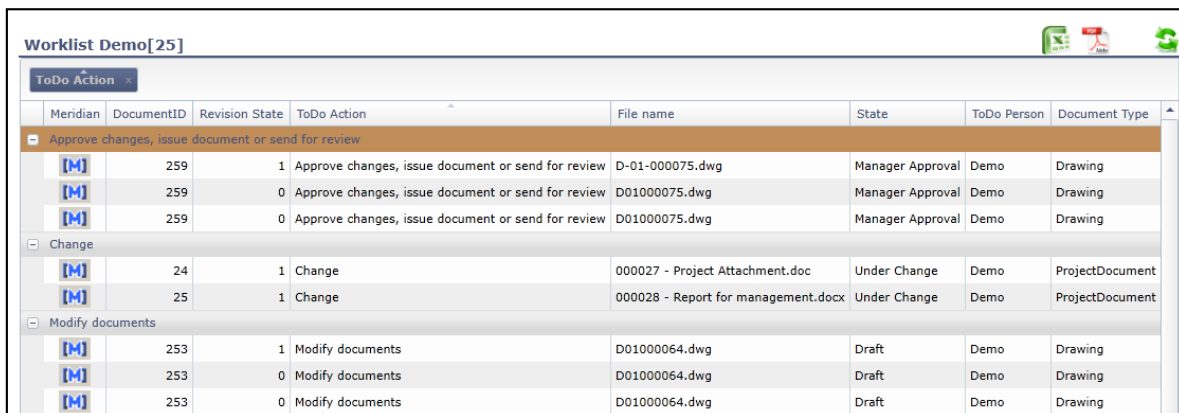


Add new Property to Group By

To add a new property, user must press  . After this action, a screen will pop up as image below. Select a property and press **Add Property** button.



After this, Report will be organize grouping information as defined in configuration phase as image shown below



The screenshot shows a 'Worklist Demo[25]' table with columns: Meridian, DocumentID, Revision State, ToDo Action, File name, State, ToDo Person, and Document Type. The table is grouped by 'ToDo Action'.

Meridian	DocumentID	Revision State	ToDo Action	File name	State	ToDo Person	Document Type
Approve changes, issue document or send for review							
[M]	259	1	Approve changes, issue document or send for review	D-01-000075.dwg	Manager Approval	Demo	Drawing
[M]	259	0	Approve changes, issue document or send for review	D01000075.dwg	Manager Approval	Demo	Drawing
[M]	259	0	Approve changes, issue document or send for review	D01000075.dwg	Manager Approval	Demo	Drawing
Change							
[M]	24	1	Change	000027 - Project Attachment.doc	Under Change	Demo	ProjectDocument
[M]	25	1	Change	000028 - Report for management.docx	Under Change	Demo	ProjectDocument
Modify documents							
[M]	253	1	Modify documents	D01000064.dwg	Draft	Demo	Drawing
[M]	253	0	Modify documents	D01000064.dwg	Draft	Demo	Drawing
[M]	253	0	Modify documents	D01000064.dwg	Draft	Demo	Drawing

FlowDocs

Carlos Pellegrini 651 5th Floor
(C1009ABM) Buenos Aires - Argentina
Telephone: (+5411) 5353-9804, Mail to: contacto@flowdocs.com

Report Properties

User can select which properties are shown in the report , set columns order and name, create Meridians document link to access to document in Vault, create a link to an external web with one or more properties as parameter.

Pos	Property	Alias	TAG	Type
0	RevisionState	RevisionState	RevisionState	Text
1	ToDoAction	ToDoAction	ToDoAction	Text
2	Filename	Filename	Filename	Text
3	StateText	StateText	StateText	Text
4	ToDoPerson	ToDoPerson	ToDoPerson	Text
5	DocumentTypeDisplay Name	DocumentTypeDisplay Name	DocumentTypeDisplay Name	Text

Order columns position

User can select a row in the grid and press on the arrows to move column to desired position

Set column name

User can set name to column modifying Alias field.

Property	Alias
ToDoAction	ToDo Action
Filename	File name

Create document link to Meridian

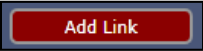
User select grid row of property with Meridian ID and set type as Link.

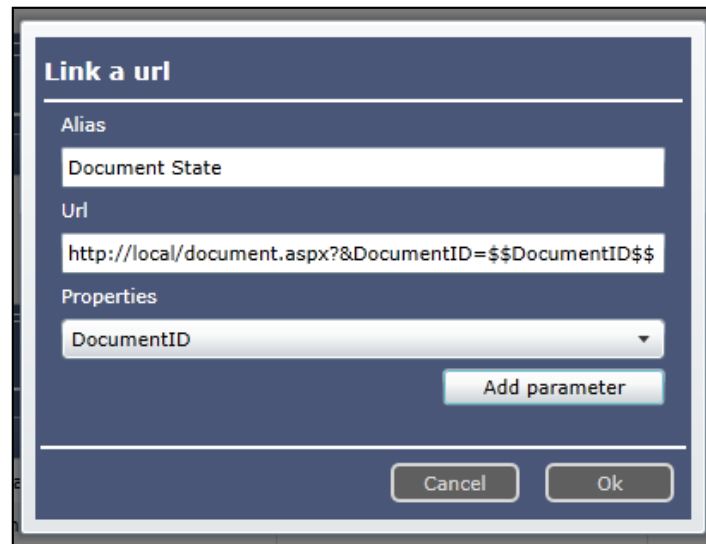
Pos	Property	Alias	TAG	Type
0	DocumentGlobalID	Meridian	DocumentGlobalID	Link
1	DocumentID	DocumentID	DocumentID	Text
2	RevisionState	Revision State	RevisionState	Link

Condition: The Report must have a property with name **vault** that defines the Vault Name of the document. The Vault must be configured in Vaults section (see Reports Configuration Meridian Vaults).

FlowDocs

Create Link

User can create a link to an external web. User must press  button and the window will pop up as the image that is shown below.



The dialog box titled "Link a url" has a dark blue header. It contains three main sections: "Alias" with a text input field containing "Document State"; "Url" with a text input field containing "http://local/document.aspx?&DocumentID=\$\$DocumentID\$\$"; and "Properties" with a dropdown menu showing "DocumentID". Below the dropdown is an "Add parameter" button. At the bottom of the dialog are "Cancel" and "Ok" buttons.

Alias

Defines the name of the column where the link is show.

Url

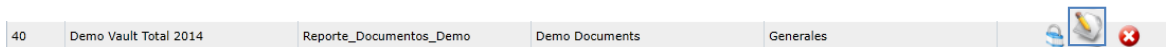
Defines the url to access to external web

Add Parameter

Adds a property as parameter to the url. The parameter name can be edited directly in the url. Value will be replace on execution time. **Note:** Don't change value (Example: \$\$DocumentID\$\$) because system will not recognize it before change it in execution time.

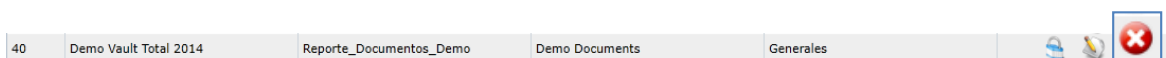
Edit Report

To edit a report, user must click on edit button in the grid row of the report to edit. After this action, edit report window will appear. After the user completed required data, must click ok button to save changes.




Delete Report

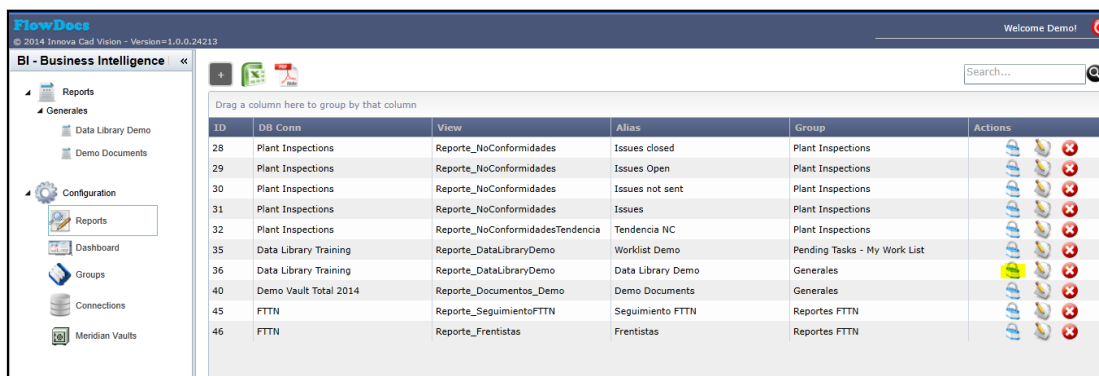
To delete a report, user must click on **delete** button in the grid row of the report to delete.



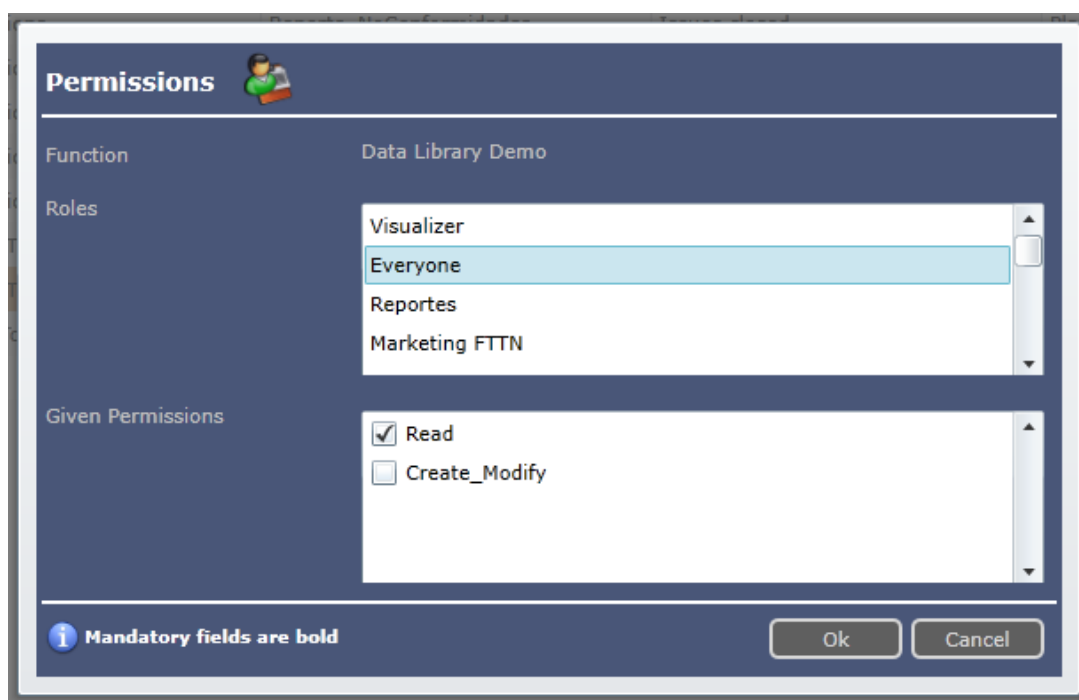
FlowDocs

Setting Report Security

User can define which roles can view the report. For this, on report row user must click on  to access Report Permissions.




After this action, Report Permissions window will pop up as image below.

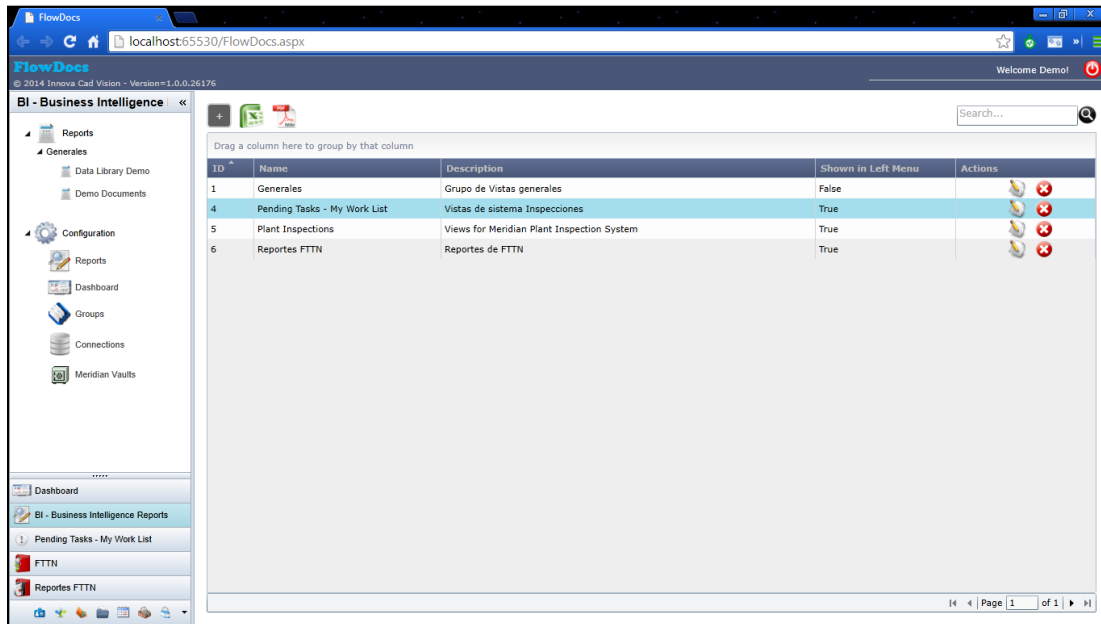


Selecting each role, user can define if report can be accessible for the selected role by checking read option. This function is accessible for users that can create/update reports.


FlowDocs

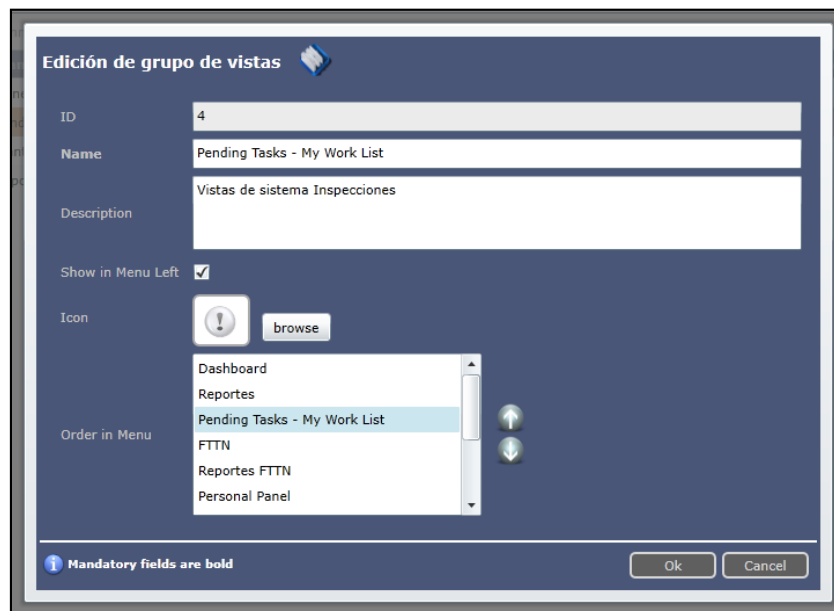
Groups

User can define groups of reports to organize them. Also a group can be an item of the menu left to have access directly to reports. To access to Groups configuration press  Groups



New Group

To create a new Group, user must press on . After this action, new Group window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.




Edición de grupo de vistas

ID: 4

Name: Pending Tasks - My Work List

Description: Vistas de sistema Inspecciones

Show in Menu Left: ☒

Icon:  browse

Order in Menu:

- Dashboard
- Reportes
- Pending Tasks - My Work List
- FTTN
- Reportes FTTN
- Personal Panel

Mandatory fields are bold

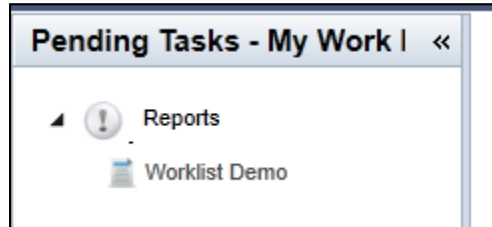
Ok Cancel

FlowDocs

Group in Menu Left


To show the Group as an item of the Menu, User must click on checkbox Show in Menu Left. After this action, user must select an image to use in menu and define the position in menu of the group item.

The result of this action is shown in the image below




FlowDocs

Meridian Vaults Access

User can define a Meridian Vault to access to documents in reports that shows needed information. To access to Meridian Vaults configuration user must press on  Meridian Vaults button.

New Meridian Vault


To create a new Meridian Vault access, user must press on . After this action, new Meridian Vault window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.

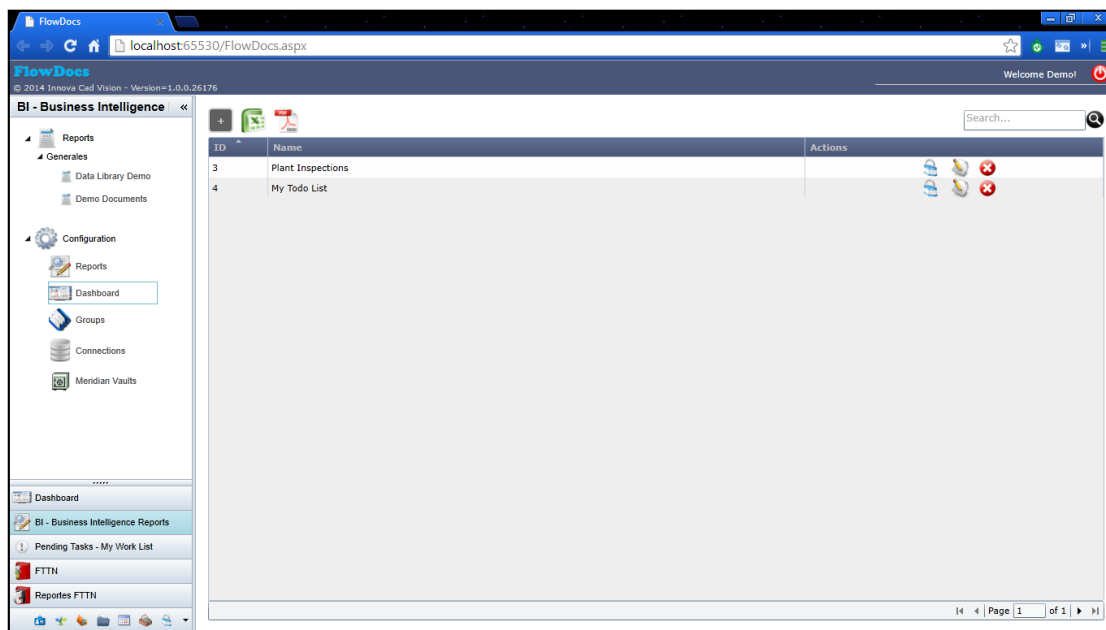


The image shows a dialog box titled "Meridian Vault Access" with a small icon next to the title. It contains four input fields: "ID" with the value "0", "Vault", "Equipment", and "Url". The "Vault", "Equipment", and "Url" fields are bolded, indicating they are mandatory. At the bottom left, there is a blue information icon and the text "Mandatory fields are bold". At the bottom right, there are "Ok" and "Cancel" buttons.

FlowDocs

Dashboard Configuration


System Dashboards can be configured by user accessing Reports Configuration in left menu after pressing on  **Dashboard** button.



After user action, system will show screen (previous image) with all the configured dashboards with the possibility to create a new one, edit, delete or define visibility for each dashboard.

FlowDocs

New Dashboard

To create a new Dashboard, user must press on . New Dashboard window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.

Dashboard

ID

Name

Add Item

ID	Report	Type	Position	
16	Issues Open	Grilla	0	 
17	Tendencia NC	Gráfico de líneas	1	 
18	Issues	Gráfico de barras	2	 
23	Issues closed	Grilla	3	 

Ok

Cancel

Name

Name of the dashboard that represents the groups of reports configured.

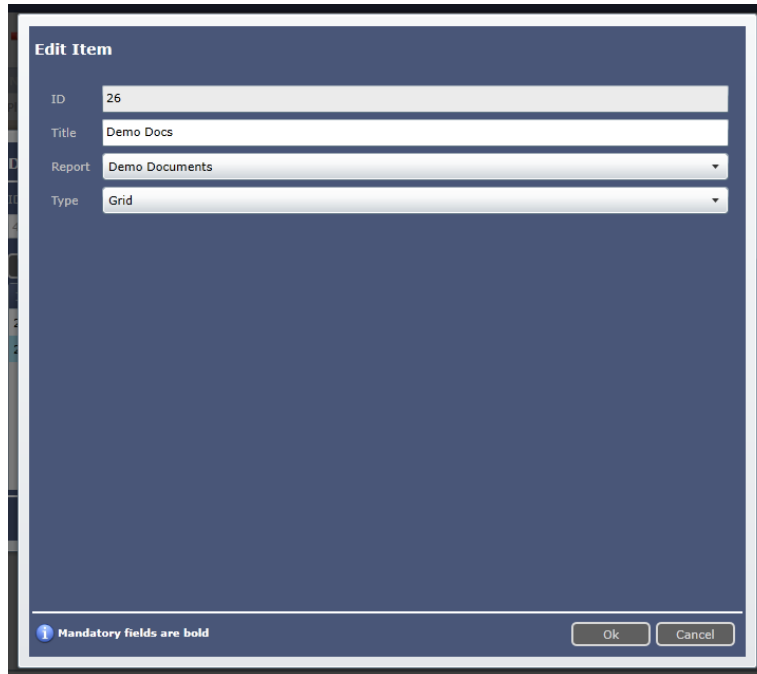
Items

List of reports of the dashboard. To add an item, press on **add item** button.

FlowDocs

Add/Edit Grid Item

An item is composed by a report defined on report configuration. The data can be show as a grid and is very simple, must select the report to show, input the title and select the grid type as shown in image below.




Edit Item

ID: 26

Title: Demo Docs

Report: Demo Documents

Type: Grid

 Mandatory fields are bold

Ok Cancel

FlowDocs


Carlos Pellegrini 651 5th Floor
(C1009ABM) Buenos Aires - Argentina
Telephone: (+5411) 5353-9804, Mail to: contacto@flowdocs.com

Add/Edit Chart Item

An item is composed by a report defined on report configuration. The data can be show as a chart.

Edit Item

ID	18
Title	Issues
Report	Issues
Type	Chart
Graphic type	Bars
Field Group By	EstadoDescripcion
Field X axis	EstadoDescripcion
Label X axis	Estados
Date range X axis	Not Apply
Field Y axis	EstadoDescripcion
Label Y axis	Cantidad
The field of Y axis must accumulate values?	<input checked="" type="checkbox"/> Use when data is not been accumulated in every point of x axis
Filter Field	TAGEquipo
Label Filter	TAG


 **Mandatory fields are bold**

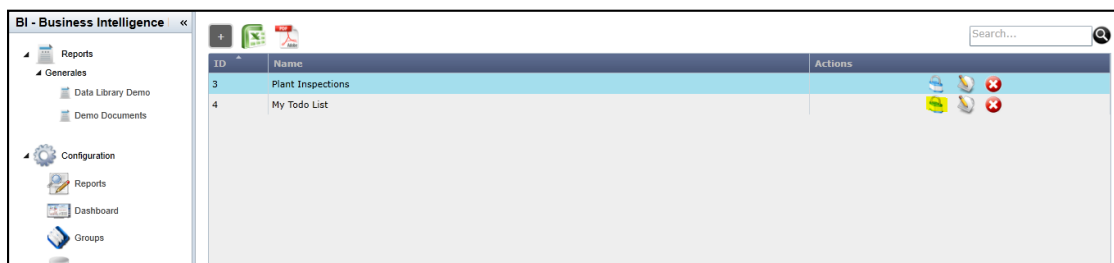
OkCancel

FlowDocs

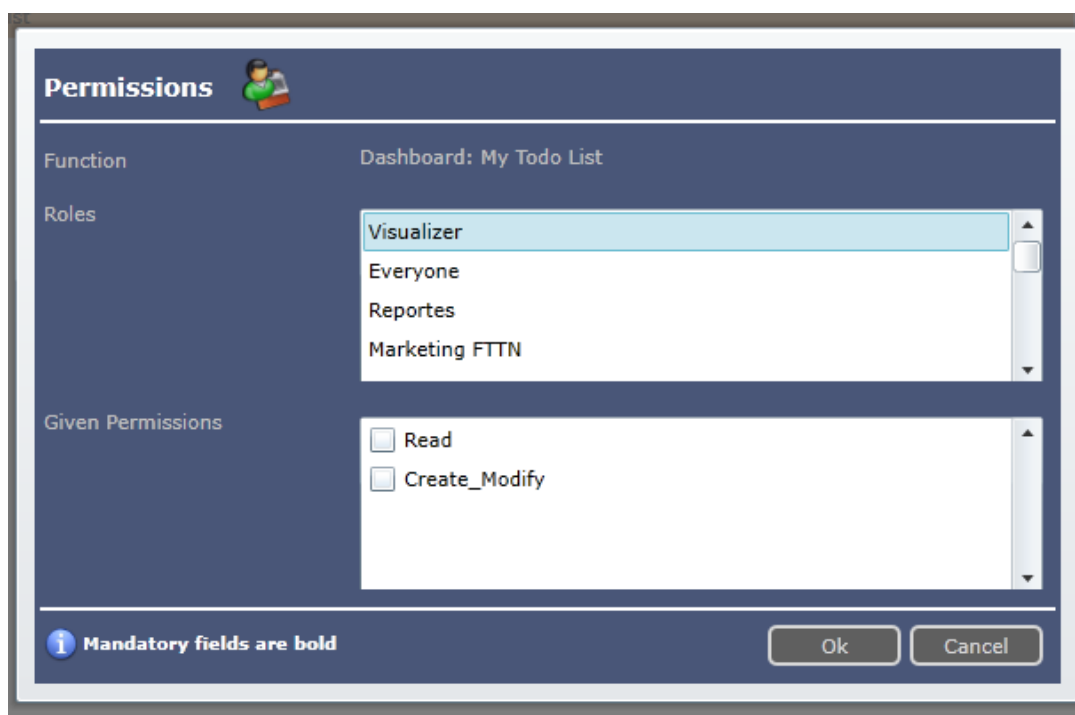
Carlos Pellegrini 651 5th Floor
(C1009ABM) Buenos Aires - Argentina
Telephone: (+5411) 5353-9804, Mail to: contacto@flowdocs.com

Setting Dashboard Security

User can define which roles can view the dashboard. For this, on dashboard row user must click on  to access Dashboards Permissions.



After this action, Dashboard Permissions window will pop up as image below.



Selecting each role, user can define if dashboard can be accessible for the selected role by checking read option. This function is accessible for users that can create/update dashboards.

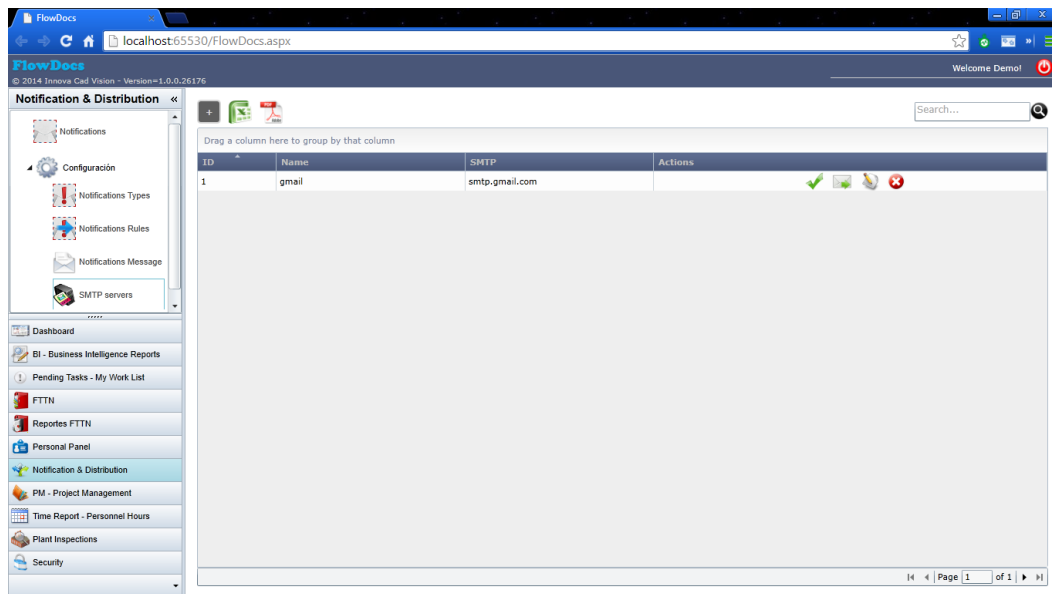
FlowDocs

NOTIFICATIONS

Notifications module, allows user to notify and distribute work easily. It allows user to define types, for create a notification on any milestone of the process and to define rules to manage notifications in automatic way. This module also works with Sql Server Stored procedures, useful to create notifications in Meridian and also a service that can be run as a Windows server task to send the notifications.


SMTP Servers

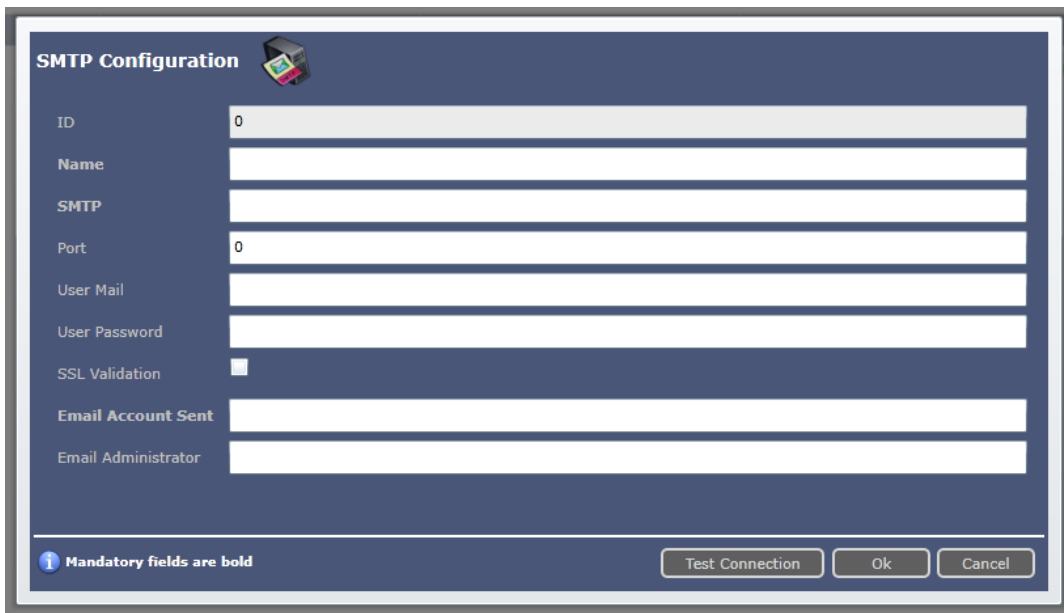
First of all, user need to configure SMTP servers to send notifications.



FlowDocs

New SMTP Server configuration

To create a new SMTP Server configuration, user must press on . New SMTP Server Configuration window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.







The image shows a 'SMTP Configuration' dialog box with a dark blue header and a light blue body. It contains several input fields for configuration: ID (with '0' pre-filled), Name, SMTP, Port (with '0' pre-filled), User Mail, User Password, SSL Validation (a checkbox), Email Account Sent, and Email Administrator. At the bottom, there is a status bar with a blue information icon and the text 'Mandatory fields are bold', and three buttons: 'Test Connection', 'Ok', and 'Cancel'.

This configuration depends on SMTP.

Test SMTP Connection

User can test if SMTP is valid by clicking on Test Connection button in CRUD or in SMTP connections list by clicking Check image (see image below).





Drag a column here to group by that column			
ID	Name	SMTP	Actions
1	gmail	smtp.gmail.com	   

FlowDocs

Test E-mail sending

User can test if the SMTP configuration is correct sending an email. This option is on SMTP configurations list by Clicking on **Send Email** image (see image below).

Drag a column here to group by that column

ID	Name	SMTP	Actions
1	gmail	smtp.gmail.com	   

Complete information and send email to see if email arrives

New Email 

To

Subject

Message

Send

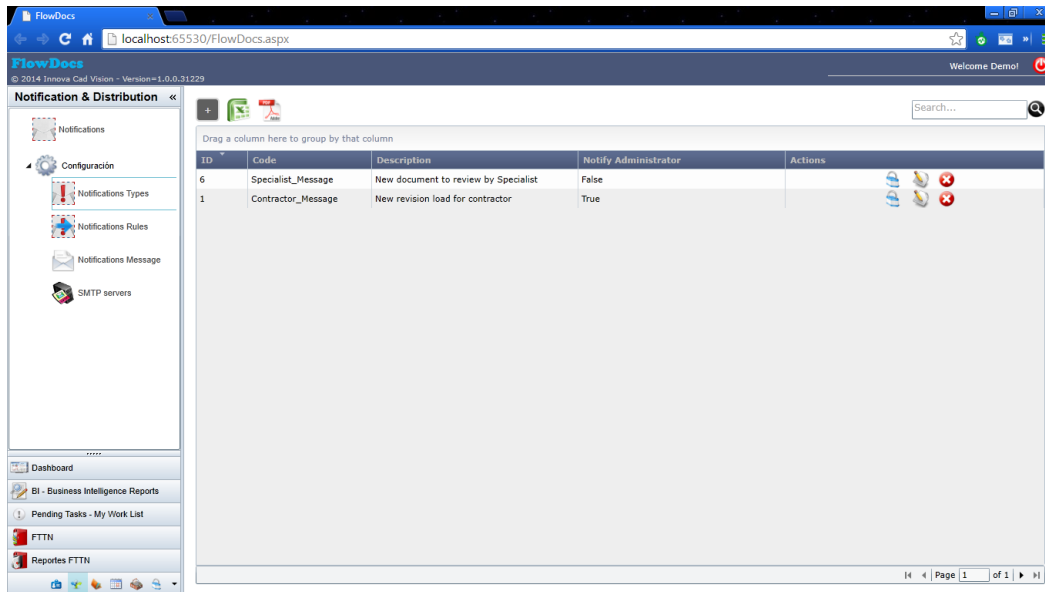
Cancel

FlowDocs

Carlos Pellegrini 651 5th Floor
(C1009ABM) Buenos Aires - Argentina
Telephone: (+5411) 5353-9804, Mail to: contacto@flowdocs.com

Notification Types

User can define notifications types to use in different process. Types defines, which roles must be notified when a notification of this type is created, defines subject, body and if SMTP administrator must be notified when this occurs.









FlowDocs
© 2014 Innova C&I Vision - Version=1.0.0.31223
Welcome Demo!

Notification & Distribution

Search...

Drag a column here to group by that column


ID	Code	Description	Notify Administrator	Actions
6	Specialist_Message	New document to review by Specialist	False	  
1	Contractor_Message	New revision load for contractor	True	  

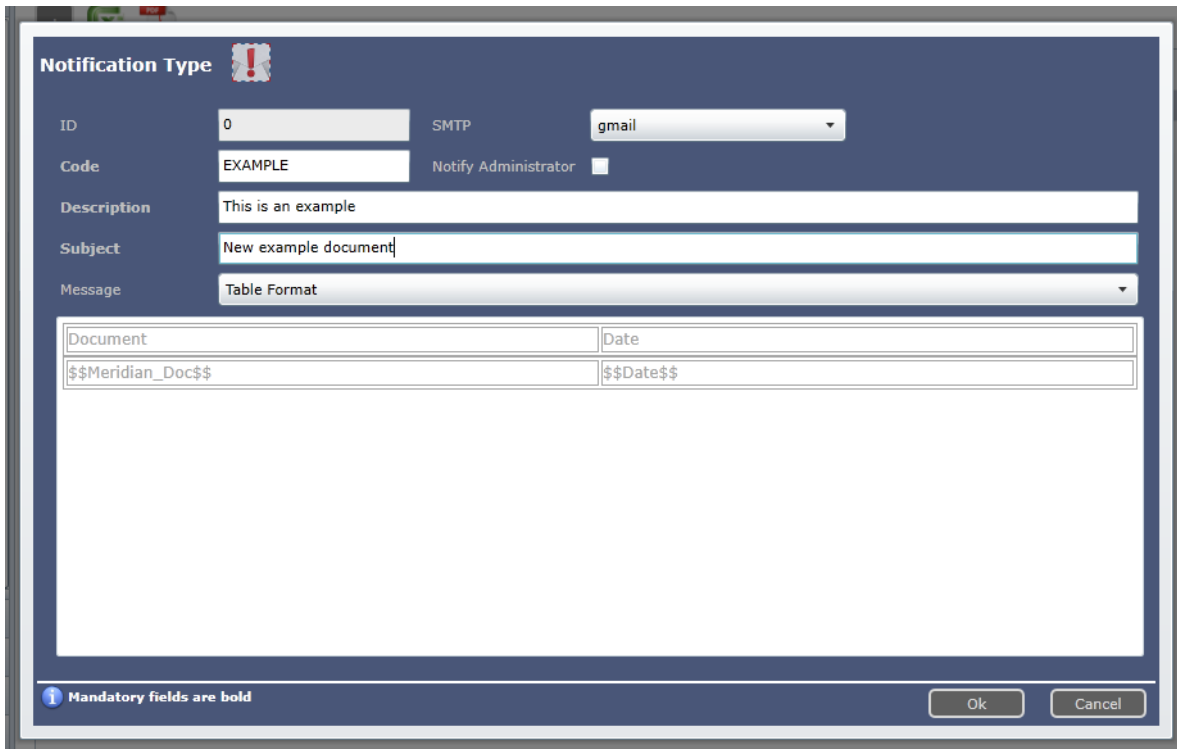
Page 1 of 1

FlowDocs

Carlos Pellegrini 651 5th Floor
(C1009ABM) Buenos Aires - Argentina
Telephone: (+5411) 5353-9804, Mail to: contacto@flowdocs.com

New Notification Type

To create a new Notification Type, user must press on . New Notification type window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.



Document	Date
Document	Date
\$\$Meridian_Doc\$\$	\$\$Date\$\$

Code The is use to create the notification according the Type.

Note: In Meridian, user can call an Stored procedure as **AddNotification(Code, Vars, delimiter)** where **Code** is Notification Type code, **Vars** is a String containing pair variable/value, for example, vars can be '\$\$Meridian_Doc\$\$=Example.doc;\$\$Date\$\$=Now' and **delimiter** will be ';'.

Description is a text to explain notification type usage

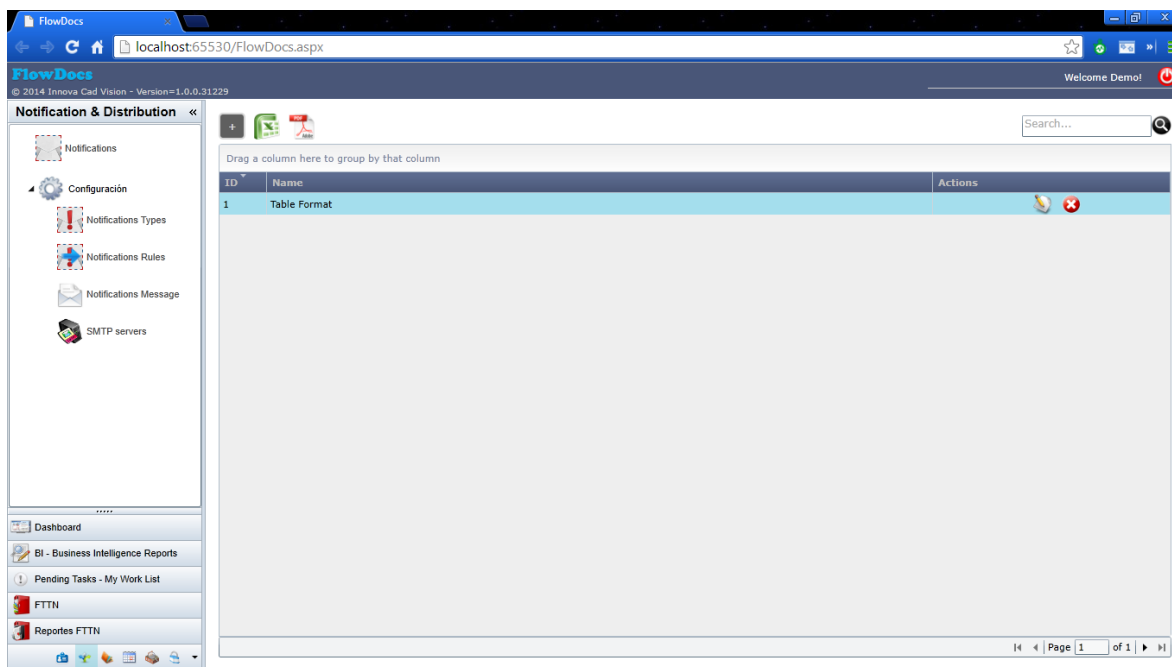
Subject is the subject of the email to send

Message is the message format use for this notification

FlowDocs


Notification Message Format

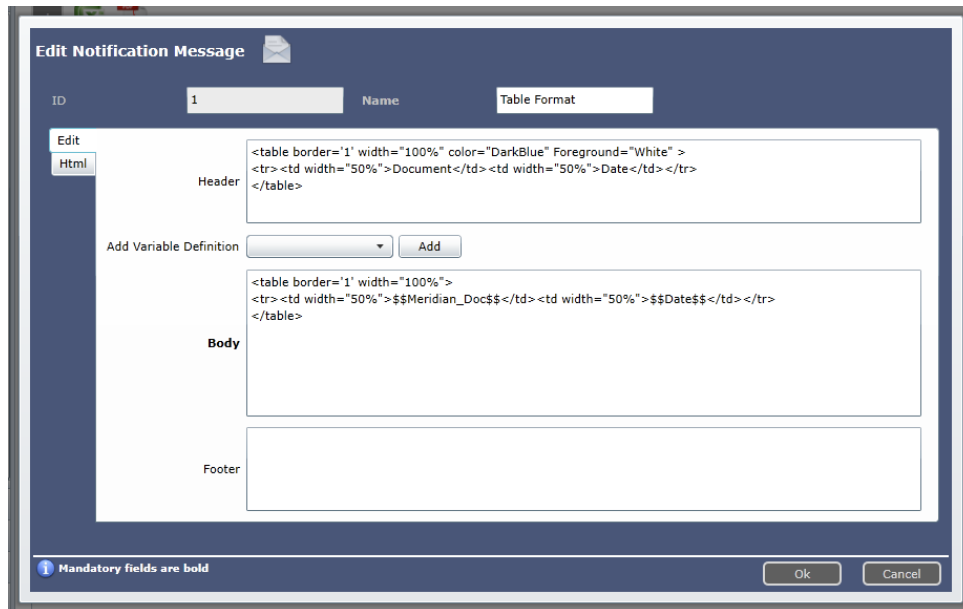
User can define a message format to use in different kinds of notifications. This message format allows to generate a format, for example, to notify users of the new documents despite the different groups to notify.



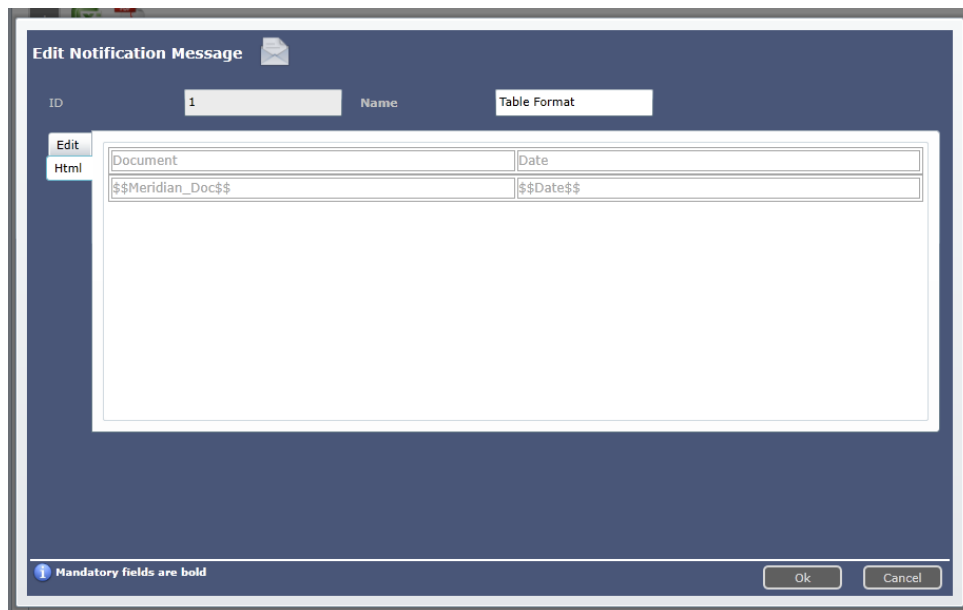
FlowDocs

New message format

To create a new message format, user must press on . New message format window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.



If user wants to see message format result, must press on html tab to see if the html generated is fine.

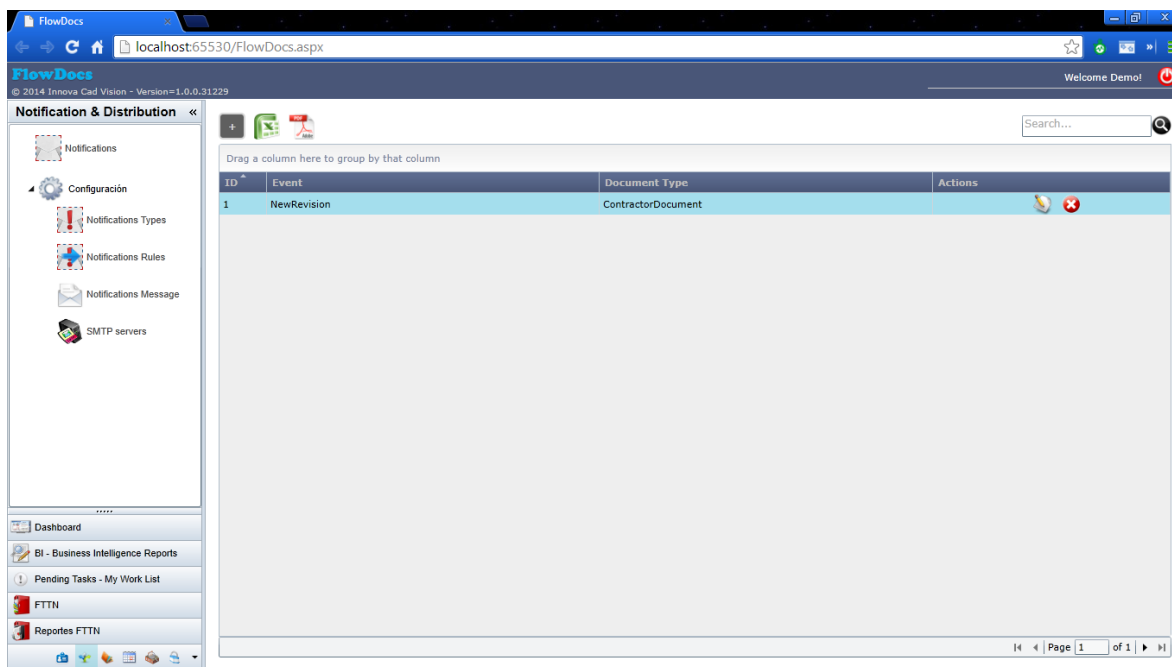


FlowDocs

Carlos Pellegrini 651 5th Floor
(C1009ABM) Buenos Aires - Argentina
Telephone: (+5411) 5353-9804, Mail to: contacto@flowdocs.com


Notification Rule

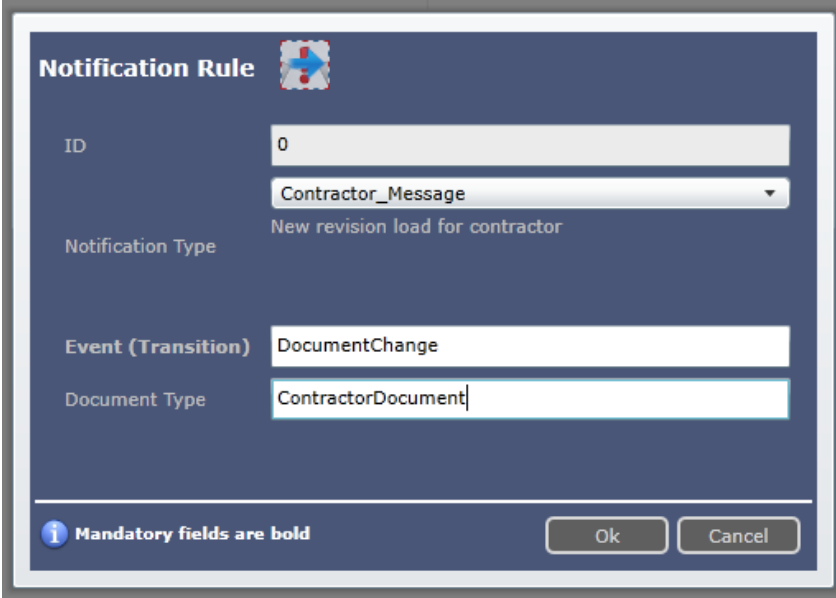
A Rule is use to call notification creation in automatic way. If user defines a set of rules, and calls this rules from the code, the user can manage which notification type call for each rule depending on functional implementation.



FlowDocs

New Notification Rule

To create a new rule, user must press on . New notification rule window will pop up as image shown below. After the user completed required data, must click **ok** button to save changes.




Notification Rule

ID: 0

Notification Type: Contractor_Message
New revision load for contractor

Event (Transition): DocumentChange

Document Type: ContractorDocument

 Mandatory fields are bold

Ok Cancel

Notification Type Select the notification type to execute for this rule.

Event (Transition) Is an event or workflow transition that occurs in system. In case of Meridian, this can be, for example, the event after new document.

Document Type is a variable that depends on document type in case of Meridian but can be use as other variable.

Note: In Meridian, on event After New Document, system can call an Stored procedure as **AddNotificationRule(Event, DocumentType, Vars, Delimiter)** where **Event** is AfterNewDocument, **DocumentType** is the document Type that has been created, **Vars** can be '\$\$Meridian_Doc\$\$=Example.doc;\$\$Date\$\$=Now' and **Delimiter** will be ';'. In this case, on every Meridian implementation the notification can be different depending on functional needs without modifying Meridian code.

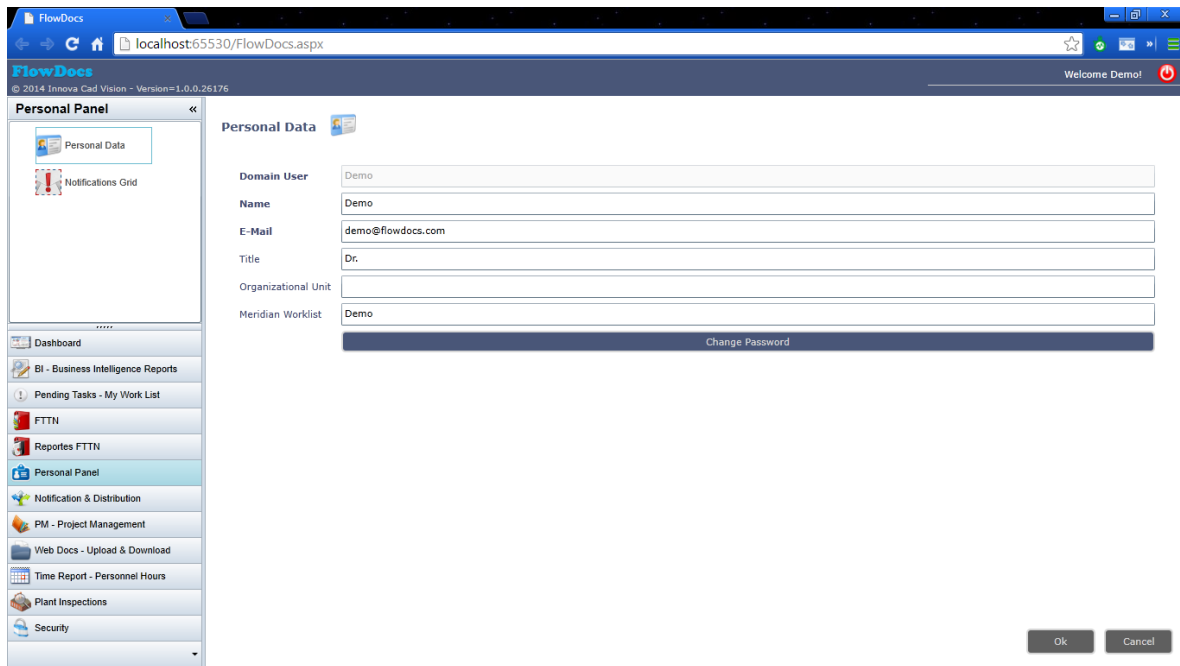
FlowDocs

Personal Panel

The personal panel contains the user personal data and allows user to manage his password, email and others. Also user can turn on/off notifications that are not mandatory.

User Personal Data

User can edit its own personal information or change his password.



The screenshot displays the FlowDocs web application interface. The browser address bar shows 'localhost:65530/FlowDocs.aspx'. The page header includes 'FlowDocs' and '© 2014 Innova Cad Vision - Version=1.0.0.26176'. A 'Welcome Demo!' message is visible in the top right corner. The main content area is titled 'Personal Data' and contains several input fields: 'Domain User' (filled with 'Demo'), 'Name' (filled with 'Demo'), 'E-Mail' (filled with 'demo@flowdocs.com'), 'Title' (filled with 'Dr.'), 'Organizational Unit' (empty), and 'Meridian Worklist' (filled with 'Demo'). Below these fields is a 'Change Password' button. On the left side, there is a sidebar menu with the following items: 'Personal Data', 'Notifications Grid', 'Dashboard', 'BI - Business Intelligence Reports', 'Pending Tasks - My Work List', 'FTTN', 'Reportes FTTN', 'Personal Panel' (highlighted), 'Notification & Distribution', 'PM - Project Management', 'Web Docs - Upload & Download', 'Time Report - Personnel Hours', 'Plant Inspections', and 'Security'. At the bottom right of the page, there are 'Ok' and 'Cancel' buttons.

Change Password

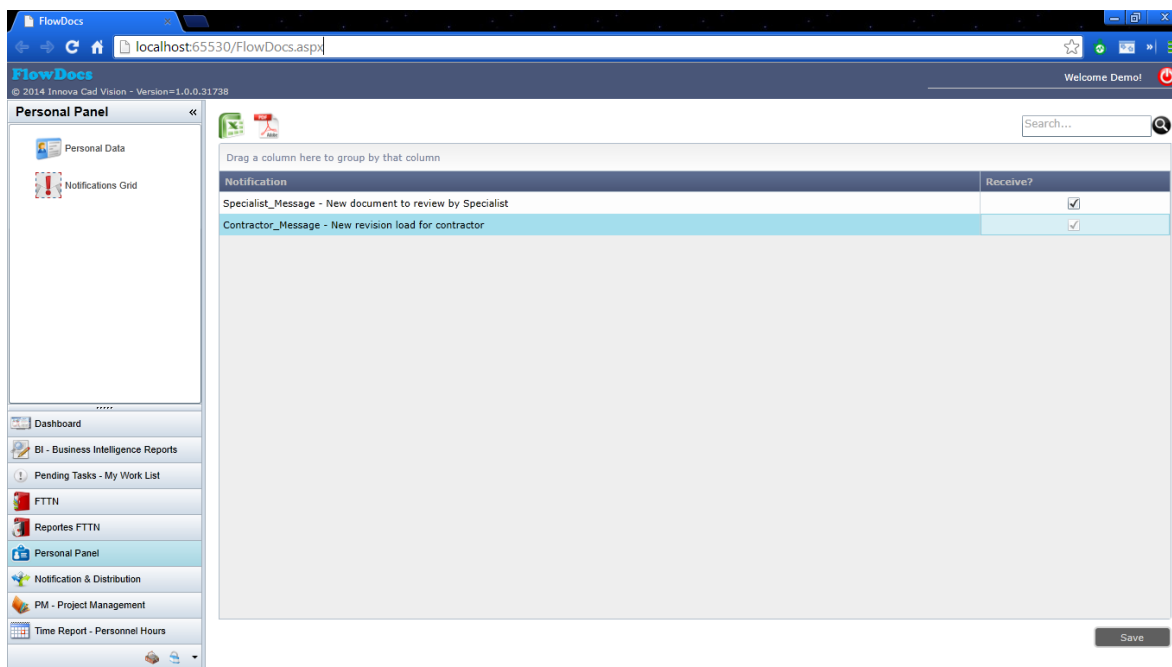
User must press on Change Password button and complete data required in change password form.

FlowDocs

Carlos Pellegrini 651 5th Floor
(C1009ABM) Buenos Aires - Argentina
Telephone: (+5411) 5353-9804, Mail to: contacto@flowdocs.com

Notifications grid

The notification grid, contains all the notifications that user must receive (mandatory notifications) or can receive.



Turn on/off Notification

User can uncheck every enabled notification. Mandatory notifications have disabled checkbox.

FlowDocs